E-RATE INVOICING

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July 2016

TOPICS FOR THIS PRESENTATION

- How to view your Funding Commitment Decision Letter (FCDL)
- Review the E-rate forms that release funding to applicants or make adjustments to amounts or service dates:
  - Form 486 (Every recipient of funding has to file one.)
  - Form 472 (BEAR form)
    - Form 498 (direct deposit information for BEAR)
  - Form 500
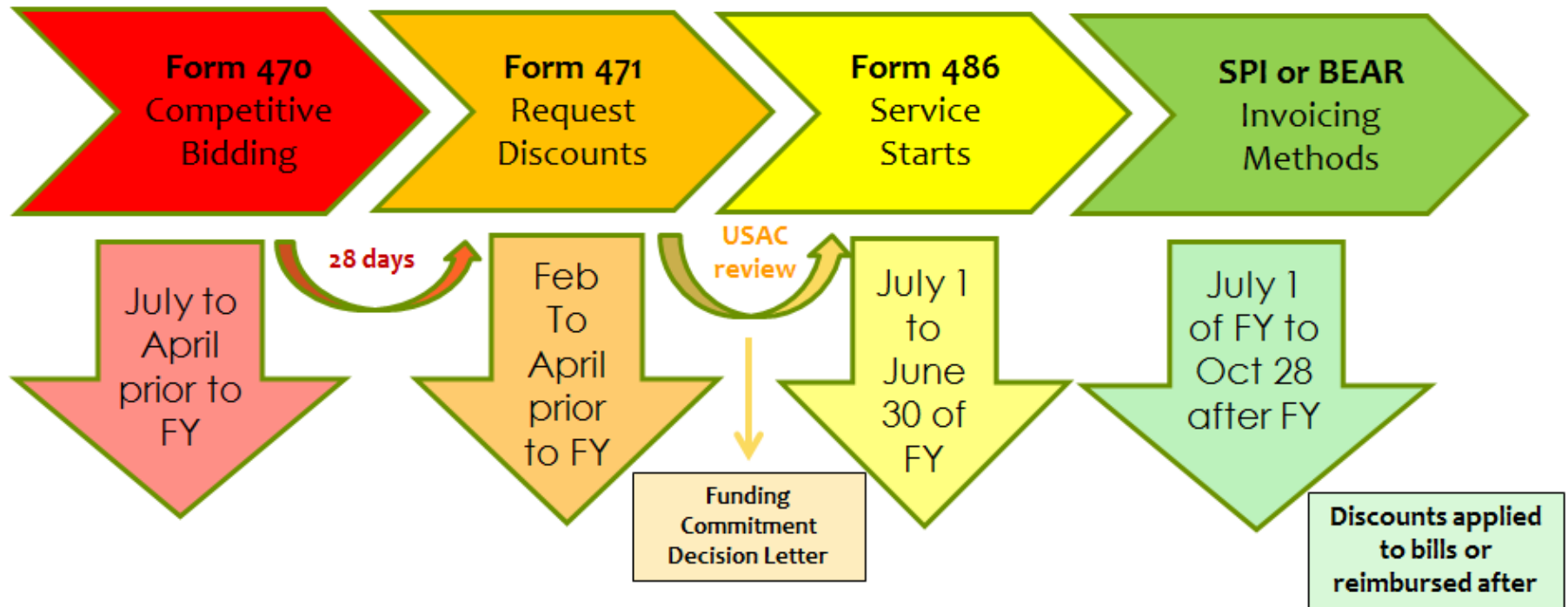 - Service Substitution letter

DISCLAIMERS

- These instructions represent my unofficial interpretation of the FCC's E-rate rules and regulations. **Official guidance can come only from the FCC and USAC.**

- USAC is working constantly to fix technical problems and other errors in both the E-rate Productivity Center and in training documents. What I present today is correct to the best of my knowledge, but what you see in EPC may be different.

THE E-RATE PROCESS

Form 470
Competitive
Bidding

Form 471
Request
Discounts

Form 486
Service
Starts

SPI or BEAR
Invoicing
Methods

28 days

USAC review

July to
April
prior to
FY

Feb
To
April
prior
to FY

July 1
to
June
30 of
FY

July 1
of FY to
Oct 28
after FY

Funding
Commitment
Decision Letter

Discounts applied
to bills or
reimbursed after

FUNDING COMMITMENTS

FUNDING COMMITMENTS IN EPC

To: sp7user1@testmail.usac.org
From: Application Administrator <application.administrator@usactest.org>
Message Id: 1463081924-1990003632337-sp7user1
Subject: EPC Notification - E-rate Funding Commitment Decision Letter (FCDL) available for SPIN: 143003990
Received: Thu May 12 2016 15:38:44 GMT-0400 (Eastern Daylight Time)

text/html ▼

Show Json

USAC
Universal Service Administrative Company

Hello,

The Funding Commitment Decision Letter (FCDL) for the FCC Form 471 funding requests included in the most recent commitment wave that featured Verizon (SPIN: 143003990) has been issued. To view the FCDL, login to USAC's E-rate Productivity Center (EPC) by clicking on the link below. From your landing page, navigate to the Notification Center and click on Generate Notification. If the notification has already been generated, you will instead see a link that says View Notification; click on View Notification or navigate to your News Feed to view the FCDL details.

Login to EPC

If you have questions, or believe that you received th
(888) 203-8100 for assistance.

Thank you,

Universal Service Administrative Company

> **When your Form 471 has been reviewed, you'll receive an email notice directing you to the E-rate Productivity Center to view your Funding Commitment Decision Letter (FDCL).**

> **Watch USAC's video on the Funding Commitment Decision Letter for applicants found on this page:**
> **http://www.usac.org/sl/about/outreach/videos/FCC-Form-471-Funding-Commitment-Decision-Letter-series.aspx**

GENERATE AND VIEW NOTIFICATIONS

My Landing Page

USAC

Welcome, Cathy School!

In the Notifications section at the top of My Landing Page, set the Notification Type to FCDL and the Funding Year to 2016 to bring up a list of your library's FCDLs.

Notifications

Notification Type	FCDL	▼
Funding Year	2016	▼
Wave Number	Please select a value	▼

Status ❓ ⦿ All
  ○ Generated
  ○ Not Generated

	Notification	Description	Issued Date	Generated By	Generated On	
🔍	FCDL	FCC Form 471 - 161002652	5/20/2016	e@e.com	6/2/2016 4:26 PM EDT	View Notification
🔍	FCDL	FCC Form 471 - 161002650	5/20/2016	e@e.com	6/2/2016 6:10 PM EDT	View Notification
🔍	FCDL	FCC Form 471 - 161002506				
🔍	FCDL	FCC Form 471 - 161002526				
🔍	FCDL	FCC Form 471 - 161002420				
🔍	FCDL	FCC Form 471 - 161002525	5/10/2016	e@e.com	6/2/2016 10 PM EDT	View Notification
🔍	FCDL	FCC Form 471 - 161002434	5/10/2016	e@e.com	6/2/2016 10 PM EDT	View Notification
🔍	FCDL	FCC Form 471 - 161002421	5/10/2016	e@e.com	6/2/2016 11 PM EDT	View Notification
🔍	FCDL	FCC Form 471 - 161002429	5/10/2016	e@e.com	5/11/2016 4:15 PM EDT	View Notification
ⓘ	FCDL	FCC Form 471 - 161002524	5/10/2016			Generate Notification

In the far right column, click on Generate Notification, then View Notification to go to your Funding Commitment Decision Letter.

◄◄ ◄ 1-10 of 18 ► ►►

FCDL on the News Feed

The FCDL Supplement document linked in the entry has information on next steps to take and appealing funding decisions if needed.

The funding status and amount funded for your funding requests will be listed in an Excel file.

FCDL GIVING YOU FITS? TRY E-RATE CENTRAL

- E-rate Central is a third-party website that downloads information about 471s and funding commitments. Its displays are often much easier to view and understand than USAC's.

- Go to the page for Kentucky E-rate info:

http://e-ratecentral.com/us/stateInformation.asp?state=KY

- Enter your library's BEN, then select:

Funding Quick Search

⦿ Billed Entity Number ○ SPIN

200246

Search

Applicant: POWELL COUNTY PUBLIC LIBRARY			
Billed Entity: 200246			
FY	**Req. FRNs**	**Funded FRNs**	**486 on File**
2016	3	0	0
2015	3	3	3
2014	2	2	2

FORM 486

Congrats on getting funding…now do this form!

WHAT IS THE FORM 486?

- The 486 has three purposes:
  - Accept and release funding committed to your library
  - Indicate that service has started or the earliest date it could start
  - Make certifications regarding compliance with the Children's Internet Protection Act (CIPA)
- A 486 must be on file before any E-rate invoicing can be filed, either by the service provider or the applicant.

NOTES ON CIPA COMPLIANCE (1/2)

- **Compliance with the Children's Internet Protection Act (CIPA) has 3 parts:**
  - **Internet Safety Policy that includes certain requirements for protecting children who use the internet at the library**
  - **Public meeting to discuss the policy.**
  - **Technology Protection Measure (filter)**

NOTES ON CIPA COMPLIANCE (2/2)

- **Libraries <u style="color:red">must</u> comply with CIPA if they receive funding for internet access or any Category Two equipment and services.**
  - **Exception: compliance is not required if the library receives support only for telecommunications (voice or transport).**
- **Compliance is critical; if you're audited and found not to be in compliance, you may have to return multiple years of funding!** **DO NOT ACCEPT E-RATE FUNDING IF YOU CAN'T CERTIFY CIPA COMPLIANCE!**
- **KDLA has a webinar on CIPA posted in the E-rate section of the Archived Webinars page: http://kdla.ky.gov/librarians/staffdevelopment/Pages/KDLAArchivedWebinars.aspx**

Best time to file the 486?

- KDLA's Technology Consultant recommends that you file a Form 486 as soon as possible after you receive your Funding Commitment Decision Letter (FCDL)

- You must indicate a Service Start Date. **The best practice is to list the earliest possible service start date (July 1)** even if you won't purchase the product/service or the service won't start until later in the year

  - **EXCEPTION:** If you opted for early installation on Category Two equipment, list the purchase date (sometime between April 1 and June 30)

DATES & DEADLINES – RECURRING SERVICES

- Recurring services = internet, phone, or other service that happens on a regular schedule
- These services must occur between July 1 – June 30 of the funding year
- Deadline for filing the Form 486 for recurring services:
  - 120 days from start of services **OR**
  - 120 days from the date on the Funding Commitment Decision Letter (FCDL)

  whichever comes latest.

Not sure about the deadline? Use this tool:
http://www.usac.org/sl/tools/deadlines/form_486.aspx

Dates & deadlines – non-recurring services

- Non-recurring services = one-time purchases such as equipment
- These services may occur between April 1st prior to funding year to September 30th following the end of funding year)
- Deadline for filing the Form 486 for non-recurring services:
  - 120 days from date of purchase/vendor installation OR
  - 120 days from the start of the funding year (July 1)

  whichever comes latest.

Not sure about the deadline? Use this tool:
http://www.usac.org/sl/tools/deadlines/form_486.aspx

WHERE DO I FIND THE FORM 486?

News   Tasks (13)   Records   Reports   Actions   Lauren Abner ▾   Appian

My Landing Page

Already started a form? Go to
Tasks to pick up where you left off.

Funding Request Report | FCC Form 470 | FCC Form 47 | FCC Form 486 | Appeal | Manage
Users | Manage Organizations | USAC Website | Contact Us | Help

USAC TRAINING

Welcome, Pioneer County Public Library System!

Notifications

Notification Type   Please select a value

Funding Year   -- Select a Funding Year --   ▼   ○ Not Generated

Notification	Description	Issued Date	Generated By	Generated On

Easiest way to start a Form 486:
On My Landing Page, click on the FCC Form
486 link near the upper right.

My Entities

Entity				de
Pioneer County Public Library System				
Loganville Branch Library	209	Loganville	KY	40078

Alternate way to start a Form 486:
Click on the name of your library where it
appears on My Landing Page. Then click on
Related Actions, then Create FCC Form 486.

FORM 486 – GENERAL INFORMATION

News   Tasks (13)   Records   Reports   **Actions**   Lauren Abner ⌄   Appian

USAC TRAINING
Save Changes

Create FCC Form 486

General Information   Select FRNs   Detailed Info   Certification   Preview

Submitting Organization Details

Pioneer County Public Library System
100 Main Street
Boonesburg, KY 40069
111-222-3333
library.system10.user1@mailinator.com

BEN: 208
FCC Registration Number: 0123456789

FCC Form 486 Details

Nickname*
Category 1 funding FY 2016-17

Funding Year*
2016 ▾

Enter an application nickname – you may want it to match the nickname of the 471.

Select the Funding Year from the drop-down.

Contact Information

Main Contact Person*
Lauren

   Lauren Abner
   library.system10.user1@mailinator.com   person's name or email

Enter the Main Contact Person for the form—must be an EPC user. Select the profile that pops up in blue when you type the name.

FCC Notice Required By The Paperwork Reduction Act (OMB Control Number: 3060-0853)

Part 54 of the Federal Communications Commission's (FCC) rules authorize the FCC to collect the information requested in this form. Responses to the questions herein are required to obtain the benefits sought by this application. Failure to provide all requested information will delay processing or result in the form being returned without action. Information requested by this form will be available for public inspection. The information provided will be used to determine whether approving this request is in the public interest. We have estimated that each response to this collection of information will take 1 hour. Our estimate includes the time to read the instructions, look through existing records, gather and maintain the required data, and actually complete and review the form or response. If you have any comments on this estimate, or on how we can improve the collection and reduce the burden it causes you, please write the Federal Communications Commission, AMD-PERM, Paperwork Reduction Project (3060-0853), Washington, DC 20554. We will also accept your comments via the Internet if you send them to pra@fcc.gov. Please DO NOT SEND COMPLETED APPLICATIONS TO THIS ADDRESS. Remember - you are not required to respond to a collection of information sponsored by the Federal government, and the government may not conduct or sponsor this collection, unless it displays a currently valid OMB control number or if we fail to provide you with this notice. This collection has been assigned an OMB control number of 3060-0853.

Cancel   Continue

FORM 486 – SELECT FRNS

Submitting Organization Details

EXAMPLE PUBLIC LIBRARY
100 MAIN STREET

BEN: 130xxx
FCC Registration Number: 001xxxxxxx

Filters

Application Number
Enter entire FCC Form 471 Application Number

Category of Service
--Select Filter by Application Category of Service--

FRN
Enter entire Funding Request Number

FRN Status
Funded

Clear Search Filters   Search

Add all (2) FRNs

	FRN	Application Number ↑	FRN Nickname	Category of Service	FRN Status
☐	1699xxxxxx	161xxxxxx	ABC Company	Category 1	Funded
☐	1699xxxxxx	161xxx.xxx	XYZ Company	Category 2	Funded

Add (0) FRNs

Selected FRNs

	FRN ↑	Application N
☐	FRN	Application N

You must associate at least one Fu

Click on Add all (#) FRNs to add all of your funded FRNs to the form. You also have the option to check the box beside particular FRNs that appear in the results, then click on Add (#) FRNs. Any FRNs you add will appear in Selected FRNs below.

FORM 486 – DETAILED INFO

- In the Detailed Info section, you'll report the Service Start Date for each of the funded FRNs you selected.

- By default, the form will display the Service Start Date you indicated on the Form 471—generally this will be 7/1.

- To correct dates, check the box to the left of the FRN(s) and enter the date.

FORM 486 – EARLY FILING AND CIPA WAIVER

FCC Form 486

General Information — Select FRNs — Detailed Info — **Certification** — Preview

Billed Entity Information

EXAMPLE PUBLIC LIBRARY
100 MAIN STREET

Billed Entity Number: 1xxxxx
FCC Registration Number: 001xxxxxxx

> **Check Early Filing ONLY if**
> a)   the form is submitted before August 1st (this counts as early filing) and
> b)   you can certify your compliance with CIPA.

Early Filing

CHECK THE BOX BELOW IF THE FRNS ON THIS FCC FORM 486 ARE FOR SERVICES STARTING ON OR BEFORE JULY 31 OF THE FUNDING YEAR.

☐ The Funding Requests listed in this FCC Form 486 have been approved by USAC as shown in my Funding Commitment Decision Letter (FCDL). I have confirmed with the service provider(s) featured in those Funding Requests that these services will start on or before July 31 of the Funding Year.

CIPA Waiver

CHECK THE BOX BELOW IF YOU ARE REQUESTING A WAIVER OF CIPA REQUIREMENTS FOR THE SECOND FUNDING YEAR IN WHICH YOU HAVE APPLIED FOR DISCOUNTS IF YOU AS THE BILLED ENTITY ARE THE ADMINISTRATIVE AUTHORITY.

☐ I am providing notification that, as of the date of the start of discounted services, I am unable to make the certifications required by the Children's Internet Protection Act, as codified at 47 U.S.C. § 254(h) and (l), because my state or local procurement rules or regulations or competitive bidding requirements prevent the making of the certification(s) ~~otherwise required. I certify that the schools or libraries represented in the Funding Request Number(s) on this FCC Form 486 will be brought into compliance with~~

> **CIPA Waiver is very rare. Check this only if it is your 2nd year for E-rate Internet Access and/or Internal Connections funding since FY 2001 and you're still not in compliance with CIPA.**

Cancel   Back   Continue

CERTIFICATIONS

All filers should check ALL boxes under the first Certifications section.

Certifications

☐ I certify that, if required by program rules, the entity(ies) receiving discounted services as indicated on this FCC Form 486 are covered by technology plan(s) that have been approved by a state or other authorized body (i.e., a USAC-certified technology plan approver) prior to the commencement of service and that cover all 12 months of the funding year. Provide the name(s) of the organization(s) that approved a technology plan for any eligible entity that is receiving services covered under this FCC Form 486 or, if EVERY FRN listed in this FCC Form 486 is for services that do not require a technology plan, enter nothing here.

☐ I certify that the services listed on this FCC Form 486 have been, are planned to be, or are being provided to all or some of the eligible entities identified in the FCC Form 471 application(s) cited above. I certify that there are signed contracts covering all of the services listed on this FCC Form 486 except for those services provided under tariff or on a month-to-month basis. I certify that I am authorized to submit this receipt of service confirmation on behalf of the above-named Billed Entity; that I have examined this request; and that, to the best of my knowledge, information, and belief, all statements of fact contained herein are true.

☐ I understand that the discount level used for shared services is conditional, for future years, upon ensuring that the most disadvantaged schools and libraries that are treated as sharing in the services receive an appropriate share of benefits from those services. I recognize that I may be audited pursuant to this application and will retain for at least ten years (or whatever retention period is required by the rules in effect at the time of this certification) after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request any and all records, including FCC Forms 479 where required, and, if audited, will make such records available to the Administrator.

CIPA CERTIFICATIONS

CIPA Certifications

Check 1st option if your library is CIPA complaint.

◯ I certify that as of the date of the start of discounted services: a. the recipient(s) of service represented in the Funding Request Number(s) on this FCC Form 486 has (have) complied with the requirements of the Children's Internet Protection Act, as codified at 47 U.S.C. § 254(h) and (I).

◯ I certify that as of the date of the start of discounted services: Pursuant to the Children's Internet Protection Act, as codified at 47 U.S.C. § 254(h) and (I), the recipient(s) of service represented in the Funding Request Number(s) on this Form 486: (FOR SCHOOLS and FOR LIBRARIES IN THE FIRST FUNDING YEAR FOR PURPOSES OF CIPA) is (are) undertaking such actions, including any necessary procurement procedures, to comply with the requirements of CIPA for the next funding year, but has (have) not completed all requirements of CIPA for this funding year.

◯ I certify that as of the date of the start of discounted services: The Children's Internet Protection Act does not apply because the recipient(s) of service represented in the Funding Request Number(s) on this FCC Form 486 is (are) receiving discount services only for telecommunications services.

RARE: Check 2nd option if this is your library's first year since 2001 applying for Internet Access or Internal Connections and you're working towards compliance.

Cancel | Back | Preview

Check 3rd option if you're applying for Telecommunications Services only and don't need to comply with CIPA.

PRINT PREVIEW – MORE CERTIFICATIONS!?!

Certifications

☑ The Funding Requests listed in this FCC Form 486 have been approved by USAC as shown in my Funding Commitment Decision Letter (FCDL). I have confirmed with the service provider(s) featured in those Funding Requests that these services will start on or before July 31 of the Funding Year.

☐ I am providing notification that, as of the date of the start of discounted services, I am unable to make the certifications required by the Children's Internet Protection Act, as codified at 47 U.S.C. § 254(h) and (l), because my state or local procurement rules or regulations or competitive bidding requirements prevent the making of the certification(s) otherwise required. I certify that the schools or libraries represented in the Funding Request Number(s) on this FCC Form 486 will be brought into compliance with the CIPA requirements before the start of the Third Funding Year in which they apply for discounts.

☑ I certify that, if required by program rules, the entity(ies) receiving discounted services as indicated on this FCC Form 486 are covered by technology plan(s) that have been approved by a state or other authorized body (i.e., a USAC-certified technology plan approver) prior to the commencement of service and that cover all 12 months of the funding year. Provide the name(s) of the organization(s) that approved a technology plan for any eligible entity that is receiving services covered under this FCC Form 486 or, if EVERY FRN listed in this FCC Form 486 is for services that do not require a technology plan, enter nothing here.

☑ I certify that the services listed on this FCC Form 486 have been, are planned to be, or are being provided to all or some of the eligible entities identified in the FCC Form 471 application(s) cited above. I certify that there are signed contracts covering all of the services listed on this FCC Form 486 except for those services provided under tariff or on a month-to-month basis. I certify that I am authorized to submit this receipt of service confirmation on behalf of the above-named Billed Entity; that I have examined this request; and that, to the best of my knowledge, information, and belief, all statements of fact contained herein are true.

☑ I understand that the discount level used for shared services is conditional, for future years, upon ensuring that the most disadvantaged schools and libraries that are treated as sharing in the services receive an appropriate share of benefits from those services. I recognize that I may be audited pursuant to this application and will retain for at least ten years (or whatever retention period is required by the rules in effect at the time of this certification) after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request any and all records, including FCC Forms 479 where required, and, if audited, will make such records available to the Administrator.

☑ I certify that as of the date of the start of discounted services: a. the recipient(s) of service represented in the Funding Request Number(s) on this FCC Form 486 has (have) complied with the requirements of the Children's Internet Protection Act, as codified at 47 U.S.C. § 254(h) and (l).

☐ I certify that as of the date of the start of discounted services: Pursuant to the Children's Internet Protection Act, as codified at 47 U.S.C. § 254(h) and (l), the recipient(s) of service represe̶n̶t̶e̶d̶ ̶i̶n̶ ̶t̶h̶e̶ ̶F̶u̶n̶d̶i̶n̶g̶ ̶R̶e̶q̶FOR PURPOSES OF CIPA) is̶ next funding year, but has (ha̶v̶

☐ I certify that as of the date ̶represented in the Funding R̶e̶

☐ I certify as the Billed Entity̶ behalf of eligible members of t̶ at 47 U.S.C. § 254(h) and (l), ̶

☐ I certify as the Billed Entity̶

☐ I certify that some or all of the eligible consortium members checked FCC Form 479 Item 6d to seek a CIPA Waiver, and upon request from the Administrator I can provide this information.

☐ I certify that no eligible consortium members checked FCC Form 479 Item 6d to seek a CIPA Waiver.

Check only the certifications indicated. Not all certifications will be relevant to libraries/library systems. It's possible that EPC will display only the relevant certifications to you, but this is unclear as of mid-July 2016.

AFTER YOU CERTIFY - DOCUMENT RETENTION

- **Two things to print for your records:**
  - **Certifier Information page** – this will display immediately after you certify.
  - **Final PDF copy of the Form 486** – you can access this from the FCC Forms section at the bottom of My Landing Page

FCC Forms

Form Type	FCC Form 486 ▼	Status	◉ All
Funding Year	2016 ▼		○ In Review
			○ Approved
			○ Denied
			○ Cancelled

Form Number	Nickname	Funding Year	Status	Certified Date
		No items available		

NOTIFICATIONS ON LANDING PAGE

My Landing Page

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | Manage Users | Manage Organizations | USAC Website | Contact Us | Help

USAC TRAINING

Welcome, Pioneer County Public Library System!

Notifications

Notification Type | Please select a value ▼

Funding Year

Please select a value
FCDL
FCC Form 486 Notification Letter
FCC Form 486 Certification

Status ❓ ⦿ All
○ Generated
○ Not Generated

Notification	Description	Issued Date	Generated By	Generated On

On My Landing Page, use the Notification Type drop-down to view Form 486 Notification Letters and Certifications.

USAC Guidance on the Form 486

- As of early July 2016, the only guidance on the Form 486 provided by USAC is the June 10th issue of the Schools & Libraries News Brief:
  - http://www.usac.org/sl/tools/news-briefs/preview.aspx?id=700
- At some point later in the summer, a walkthrough video should be added to USAC's Online Learning Library:
  - http://www.usac.org/sl/about/outreach/online-learning.aspx

INVOICING OPTIONS

What happens after you file the Form 486?

INVOICING – SPI OR BEAR? (1/2)

Service Provider Invoicing (SPI)

- **Your service provider may apply your E-rate discount directly to your monthly bill, but they are not required to offer SPI.**

- **Some vendors ask you to select the invoicing type after the funding year starts; others will specify invoicing type on the contract.**
  - **AT&T requires their additional "Grid" documents to be completed for SPI; KDLA's Technology Consultant will help if you have problems.**

- **SPI is less paperwork for you and you won't miss out on your funding.**

INVOICING – SPI OR BEAR? (2/2)
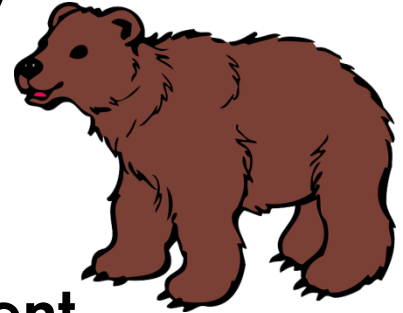
Form 472 (BEAR)

- BEAR = Billed Entity Applicant Reimbursement
- You pay the full bill upfront, then file the BEAR to receive a refund via direct deposit **(NEW for 2016)**
- Can file periodically throughout funding year or do all forms at once
- Deadline: No later than 120 days after the last date of service (for internet/telephone, the last service date is generally June 30); you may request 1 extension of 120 days (http://www.usac.org/sl/applicants/step06/invoice-extensions.aspx)
- More paperwork for you, but more control of the money flow.

E-rate Form 498 for Libraries

Lauren Abner

June 2016

Updated 6/28/2016

What is the Form 498?

- New for 2016 – file within the E-rate Productivity Center (EPC) portal
- Provides direct deposit information for E-rate invoicing
- **Required only for libraries that use Billed Entity Applicant Reimbursement (BEAR) Forms** to receive funding after paying the full bill upfront

Why is this a good thing?

- Only required once – unless banking information changes

- Service providers are removed from the BEAR Form process

- Reimbursement via direct deposit will happen in about 6 calendar days – it was about 30 for the old system

How many 498s do I need?

- *Q: Must I file a Form 498 for each of my branches?*
  - A: No. Your library system has a Billed Entity Number (BEN) that handles E-rate filing on behalf of all your branches. If you have one bank account where you want all E-rate reimbursement to be deposited, then you need only one form.
- *Q: Can I submit multiple Forms 498 if I want to use two or more bank accounts for reimbursement?*
  - A: Yes, you can file a different Form 498 for each bank account you want to reference on the BEAR form.

Who Should Complete and Certify the Form 498?

- EPC users with the Form 498 permission level of **"General Financial Contact"** can fill out the form but cannot certify it.

- EPC users with the Form 498 permission level of **"School or Library Official"** can both fill out and certify the form.

- Even if another staff member fills out the Form 498, **the library director should be the certifier since s/he has authority in the library's financial matters.**

- See next section for instructions on updating permission levels.

Info you need

- **Federal Employer Identification Number** (EIN)
- **FCC Registration Number** – this is part of your library system's profile in the E-rate Productivity Center and will auto-populate in the form
- **DUNS Number** – see next two slides
- **Banking info** - name of bank, transit (routing) number, and account number

More on DUNS Numbers (1/2)

- Most libraries already have a DUNS number assigned.

- Find your number by calling (866) 705-5711or researching at the Dun & Bradstreet website: https://www.dandb.com/dunsnumberlookup/ (search results are emailed immediately)

- You can also use the DUNS search on E-rate Central by entering your library's Billed Entity Number: http://e-ratecentral.com/us/stateInformation.asp?state=KY

D-U-N-S Lookup

BEN: [   ]

[Search]

More on DUNS Numbers (2/2)

- If you need to create a DUNS number, go to this page of the Dun & Bradstreet website: https://www.dandb.com/product/companyupdate/companyupdateLogin?execution=e2s1

- Information you'll need:
  - Library name & address
  - Name of organization owner (library director)
  - Legal structure (corporation)
  - Year the organization started
  - Primary type of business (government grantee)
  - Total number of employees (full and part-time)

Updating User Permissions

You may need to update permissions before starting or certifying a Form 498.

Account Admin Makes Changes

My Landing Page

Funding Request Report | FCC Form 470 | FCC Form 470 | Manage Users | Manage Organizations | USAC Website | Contact Us | Help

USAC TRAINING

Welcome, Pioneer County Public Library System!

The EPC Account Administrator for the library can change user permissions.

From the landing page, click on the Manage Users link near the upper right corner.

Issued Date

No items available

My Entities

Entity	Entity Number	City	State	Zip Code
Pioneer County Public Library System	208	Boonesburg	KY	40069
Loganville Branch Library	209	Loganville	KY	40078

Manage User Permissions

Check the box beside the library's name, then click on the Manage User Permissions button.

If you need to add a new user, use the Create a New User button.

498 Permission

Manage User Permissions

Organization Details

Name	Pioneer County Public Library System	**FCC Registration Number**	0123456789
Address	100 Main Street Boonesburg, KY 40069	**Organization Type**	Applicant
Mailing Address	100 Main Street Boonesburg, KY 40069	**Phone Number**	111-222-3333
		Email	library.system10

User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks y
table will continue to grow as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498.

Name	Email	Apply All	470 Permission	471 Permission	498 Permission	FRN Mod Permission
Lauren Abner	library.system 10.user1@m ailinator.com	⬍	Full ⬍	Full	School or Lib ⬍ / School or Library Official / General Financial Contac / No Access	Fu
Susie Librarylady	susie.libraryla dy@mailinato r.com	⬍	Full ⬍	Full		
Jay Peterson	jay.peterson @mailinator.c om	⬍	Full ⬍	Full ⬍	School or Lib ⬍	Fu

Cancel   Submit

Descriptions of the Form 498 permission levels appear here.

On the grid of user permissions, change the 498 Permission for the appropriate user, the click on Submit.

Form 498 Walkthrough

Locating the Form 498 in EPC

My Landing Page

USAC**TRAINING**

Welcome, Pioneer County Public Library System!

71 | Manage Users | Manage

Log into the E-rate Productivity Center:
http://portal.usac.org

Notifications

Notification Type	Please select a value	▼	Status ❷	● All
Funding Year	2017			○ Generated

	Notification	Description		Generated On	

On the landing page, click on the name of your library/system under My Entities.
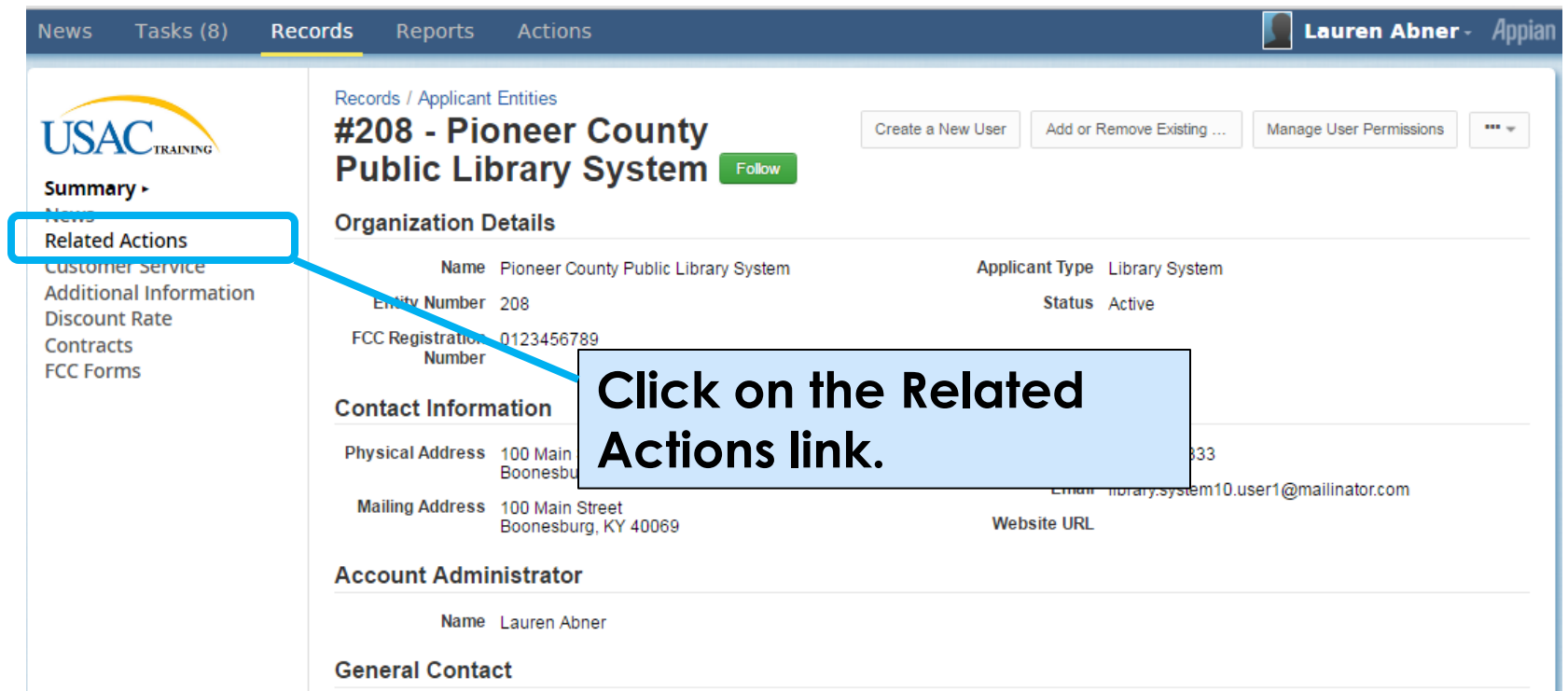
My Entities

Entity	Entity Number	City	State	Zip Code
Pioneer County Public Library System	208	Boonesburg	KY	40069
Loganville Branch Library	209	Loganville	KY	40078
Pioneer County Public Library Main Branch	210	Boonesburg	KY	40069
Pioneer County Bookmobile	211	Boonesburg	KY	40069

Related Actions

Click on the Related Actions link.

Create FCC Form 498

USAC**TRAINING**

Summary
News
Related Actions ▸
Customer Service
Additional Information
Discount Rate
Contracts
FCC Forms

Records / Applicant Entities
#208 - Pioneer County Public Library System Follow

⚡ **Create a New User**
This function allows you to create a user for your entity.

⚡ **Add or Remove Existing Users**
This process allows user to add and remove users from an organization

⚡ **Manage User Permissions**
This function allows you manage the permissions for one or more users.

⚡ **Manage Organization**
This function allows you to update information about an entity or BEN.

⚡ **Modify Account Administrator**
This process allows you to transfer the Account Administrator function to another individual.

⚡ **Create a Custo**
This function all   c request or an attachment.

⚡ **Manage Genera**
This function all

⚡ **Manage Organization Relationships**
Process to relate an Organization to another Organization

⚡ **Create FCC Form 470**
This function allows you to create an FCC Form 470 for your entity.

⚡ **Create FCC Form 471**
This function allows you to create an FCC Form 471 for your entity.

⚡ **Manage Contracts**
Create, edit, and remove contracts for your organization

⚡ **Create FCC Form 498**
This function allows you to create an FCC Form 498 for your entity.

Click on the Create FCC Form 498 link.

Form 498 – 1st page

Create a FCC Form 498

In the E-rate Program, the FCC Form 498 is used by applicants who select the direct (BEAR) invoicing process. This form establishes your bank account with USAC by collecting banking and remittance information for the organization. All BENs associated with this organization and banking/remittance information should be included on this form. Submission requires School or Library Official certification.

Pioneer County Public Library System - Pioneer County Public Library direct deposit FY 2016-17 -

Basic Information   General Financial Contact   Organization Numbers   Remittance Information   Associated B

Application Nickname

Please enter an application nickname here*

Pioneer County Public Library direct deposit FY 2016-17

Organization Information

Name
Pioneer County Public Library System

Name Company is Doing Business As (DBA) or Formerly Known As (FKA)

Holding Company Name

Mailing Address
100 Main Street
Boonesburg, KY 40069

Federal EIN, or TAX ID N

Once 'Save and Continue' is clicked, you will be able to leave the form without losing any entered information from this page. To return to the in-progress form, locate under the 'Tasks' tab.

Delete Form

Save and Continue

Enter a nickname on this page—that is the only information you should enter. Leave ALL other fields blank. Then click on the Save and Continue button.

General Financial Contact (1/2)

Create a FCC Form 498

In the E-rate Program, the FCC Form 498 is used by applicants who select the direct (BEAR) invoicing process. This form establishes your bank account with USAC by collecting banking and remittance information for the organization. All BENs associated with this organization and banking/remittance information should be included on this form. Submission requires School or Library Official certification.

Pioneer County Public Library System - Pioneer County Public Library direct deposit FY 2016-17 - 443000028

Basic Information   General Financial Contact   Organization Numbers   Remittance Information   Associated BE[N]

General Financial Contact of Pioneer County Public Library System

Enter General Financial Contact

Lauren Abner [X]

First
Lauren

Middle Initial

Last
Abner

Phone Number
502-564-1728

Phone Number Extension

E-mail
library.system10.user1@mailinator.com

Street Address
100 Main Street

Address Line 2

City
Boonesburg

State
KY

Zip Code
40069

Zip Code Extension

Once 'Save and Continue' is clicked, you will be able to leave the form without losing any entered information from this page. To return to the in-progress form, locate it under the 'Tasks' tab.

Delete Form   Previous   Save and Continue

Enter a name for the General Financial Contact **(must be an EPC user)**. When you start typing, the name should pop up—click on it, and the system will pull the contact information from the user's EPC profile.

Federal EIN and DUNS numbers

Create a FCC Form 498

In the E-rate Program, the FCC Form 498 is used by applicants who select the direct (BEAR) invoicing process. This form establishes your bank account with USAC by collecting banking and remittance information for the organization. All BENs associated with this organization and banking/remittance information should be included on this form. Submission requires School or Library Official certification.

Pioneer County Public Library System - Pioneer County Public Library direct deposit FY 2016-17 - 443000028

Basic Information General Financial Contact Organization Numbers Remitta Informa... ...rary ...ation

Further Details

Federal Employer Identification Number*

555555555

Dun and Bradstreet Number (DUNS)*

666666666

FCC Registration Number
0123456789

Enter the library's Federal Employer Identification Number (EIN) and Dun and Bradstreet Number (DUNS). Don't use dashes, hyphens, or spaces.

Once 'Save and Continue' is clicked, you will be able to leave the form without losing any entered information from this page. To return to the in-progress form, locate it under the 'Tasks' tab.

Delete Form   Previous   Save and Continue

Remittance Information

Create a FCC Form 498

In the E-rate Program, the FCC Form 498 is used by applicants who select the direct (BEAR) invoicing process. This form banking and remittance information for the organization. All BENs associated with this organization and banking/remittance requires School or Library Official certification.

Pioneer County Public Library System - Pioneer County Public Library direct 443000028

Basic Information | General Financial Contact | Organization Numbers | **Remittance Information** | Associated BE

Remittance Contact

Is the Remittance Contact the same as the General Financial Contact?
☑ Yes

Contact Information

First Name
Lauren

Last Name
Abner

Middle Initial

Title
KDLA Technology Consultant

Phone Number
02-564-1728

Phone Number Extension

Email Address
library.system10.user1@m

Financial Information

Remittance Financial Institution*
Pioneer County Bank

ACH Financial Institution Transit Number*
999999999

Financial Institution Account Number for ACH*
111111111

Once 'Save and Continue' is clicked, you will be able to leave the form without losing any entered information from this page. To return to the in-progress form, locate it under the 'Tasks' tab.

Delete Form | Previous | Save and Continue

Enter a Remittance Contact; this person will receive e-mail notifications when E-rate reimbursement has been transferred into the library's bank account. The Remittance Contact does NOT have to be an EPC user. If the General Financial Contact and Remittance Contact are the same person, check the box and the contact information will auto-populate.

Enter the name of the library's bank, the transit (routing) number, and the account number.

Additional BENs – Leave Blank!

Create a FCC Form 498

In the E-rate Program, the FCC Form 498 is used by applicants who select the direct (BEAR) invoicing process. This form establishes your bank account with USAC by collecting banking and remittance information for the organization. All BENs associated with this organization and banking/remittance information should be included on this form. Submission requires School or Library Official certification.

Pioneer County Public Library System - Pioneer County Public Library direct deposit FY 2016-17 - 443000028

| Basic Information | General Financial Contact | Organization Numbers | Remittance Information | Associated BENs | Principal Communication Types | School or Library Official Certification |

Block 14: Billed Entity Number/FCC Form 498 Association

If you are an entity that has chosen to receive your E-rate Program payments directly (BEAR invoicing), please enter the Billed FCC Form 498.

Billed Entity Number	Billed Entity Name
208	Pioneer County Public Library System

Add Additional BEN Number

Add to List

DON'T add any additional BENs on this page!

Once 'Save and Continue' is clicked, you will be able to leave the form without losing any entered information from this page. To return to the in-progress form, locate it under the 'Tasks' tab.

Delete Form   Previous   Save and Continue

Service Identification

Create a FCC Form 498

In the E-rate Program, the FCC Form 498 is used by applicants who select the direct (BEAR) invoicing process. This form establishes your bank account with USAC by collecting banking and remittance information for the organization. All BENs associated with this organization and banking/remittance information should be included on this form. Submission requires School or Library Official certification.

Pioneer County Public Library System - Pioneer County Public Library direct deposit FY 2016-17 - 443000028

Basic Information	General Financial Contact		d BENs	Principal Communication Types	School or Library Official Certification

Service Identification

Principal Communication Type — School/Library or other Bille

No additional information needed—click on Continue to Certification.

Delete Form   Previous   Continue to Certification

Continue to Certification

Create a FCC Form 498

In the E-rate Program, the FCC Form 498 is used by applicants who select the direct (BEAR) invoicing process. This form establishes your bank account with USAC by collecting banking and remittance information for the organization. All BENs associated with this organization and banking/remittance information should be included on this form. Submission requires School or Library Official certification.

Pioneer County Public Library System - Pioneer County Public Library
443000028

Basic Information	General Financial Contact	Organization Numbers	Remittance Information	Associa

Service Identification

Principal Communication Type — School/Library or other Billed Entity Recipient

Delete Form

Once submitted for certification, information in this FCC Form 498 can only be edited by a School or Library Official until it is certified. Do you wish to continue?

No   Yes

After clicking on Continue to Certification, a warning reminds you that only users with the permission level "School or Library Official" will be able to edit the form later. Click on Yes.

Review Data

Review Data

Please carefully review the data entered on the form for accuracy.
FCC Form 498 #443000028

☑ I have reviewed this form and have determined the information to be accurate.

I certify that I am a School or Library Official of the above-named entity, and that I am a
above named entity.

Persons willfully making false statements on this form can be punished by fine or forfeiture
220(e), 502, 503(b), or fine or imprisonment under Title 18 of the United States Code, 18 U

☑ I certify.

Select the checkbox to certify your FCC Form 498 Pioneer County Public Library direct deposit FY 2016-17

A download link will appear under Tasks when the PDF version of the certified form is ready to be
downloaded

Reject and Delete Form   Previous   Certify

Click on the hyperlink with the FCC Form 498 #. A separate window or tab will open so you can double-check what you entered. Click on the Previous button to go back and make changes.

If you're satisfied that all information was entered correctly, check both boxes. The Certify button will turn green—click on it.

Download Form 498 from Tasks List

News | **Tasks (9)** | Records | Reports | Actions

Click here to send a task...

USAC TRAINING

Assigned to Me ▸
Sent by Me
Starred ☆

Status
Open ×

Deadline
Overdue
Today
Within 7 days

➡ Me
Download PDF for FCC Form 498 - Pioneer County Public Library direct deposit FY 2016-17 - 443000028
A moment ago ☆

After you certify the form, click on the Tasks list. A link to a download page will appear. Save the PDF you download for your E-rate records.

Your library's Form 498 ID

![USAC - Universal Service Administrative Company]

FCC FORM 498
Form #443000028
Pioneer County Public Library direct deposit FY 2016
Page 1 of 2

Form 498 IDs are nine-digit numbers starting with 443.

Organization Information
Name: Pioneer County Public Library System
Mailing Address: 100 Main Street Boonesburg, KY 40069
Doing Business As:

Federal EIN: 555555555
Dun and Bradstreet Number (DUNS): 666666666
FCC Registration Number: 0123456789

Remittance Contact

Holding Company
Name:
Federal EIN:

General Financial
Name: Lauren Abner
Title: KDLA Technolo
Phone: 502-564-172
Email: library.system
Physical Address: 1
KY 40069

Your library's Form 498 ID is listed on the copy of the form you download from the Tasks list. You'll need this number to validate your library's banking information and to list on BEAR forms after July 1.

Validation of Banking Information

Documentation to Provide

- **You'll need to send at least one of the following to USAC after certifying your Form 498:**
  - **First page of a banking statement** that clearly indicates the library name, bank name, transit (routing) number, and account number; OR
  - **Voided check** that indicates the library name, bank name, routing number and account number.

Method #1(Preferred) – Submit Online

URL: https://efileweb.usac.org/ContributorManagement/V1/BankValidation

After certifying the Form 498, you can upload banking documentation. Starting in late June, email notices will direct Form 498 filers to this page.

This field requests the library's Form 498 ID found in the upper right corner of the certified form.

USAC
Universal Service Administrative Company®

E-FILE

UPLOAD DOCUMENTS

To: Processing Team

Company Name

Confirmation No/Filer ID/Form 498 ID

Name (first, middle initial, last)   [First]   [MI]   [Last]

Phone Number   [xxx-xxx-xxxx]   [Ext.]

Email

ℹ️ Please attach only one file; acceptable extensions are 'png','bmp','jpeg','jpg','gif', 'doc', 'docx', 'pdf', 'xls', 'xlsx', 'ppt', or 'pptx'.

Attachment: [Choose File] No file chosen

[Send]   [Exit]

Email Notification

If you have not uploaded your documentation, you may receive an email notice from USAC directing you to do so several weeks after filing the Form 498.

From: USAC Customer Support [mailto:customersupport@usac.org]
Sent: Tuesday, June 21, 2016 4:59 PM
To: ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓
Subject: Banking Information Required for 498 ID (SPIN)

Send USAC a clear image of a voided check or a statement from your financial institution.
View this message as a web page

USAC
Universal Service Administrative Company®

Helping Keep Americans Connected | www.usac.org

Banking Information Required for 498 ID

▓▓▓▓▓,

We have begun reviewing your FCC Form 498 application for ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓, and need additional information in order to issue your 498 ID to be used on your BEAR* invoice:

1. A clear image of a voided check, or
2. A statement from your financial institution that includes the bank name and your account number.

Please submit the documentation online. In the form, provide this information:

- Confirmation No./ Filer ID / Form 498 ID: **443**▓▓▓▓▓▓ :
- Company Name: ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓

If you need further assistance, please call us, Monday through Friday from 9:30 am to 4:30 pm ET, at (888) 641-8722 and select option 5, then Option 2, or email us any time.

Thank you,

USAC Customer Support
(888) 637-6226; finopsprocessing@usac.org
usac.org/sl

*Billed Entity Applicant Reimbursement (BEAR) for the Schools and Libraries (E-rate) Program

Method #2 –Fax Banking Documents to USAC

Libraries that filed the Form 498 before late June 2016 have received email notices asking for banking documents to be faxed. While Method #1 is preferred, faxed documentation will still be accepted.

VERY IMPORTANT – In addition to the library name and Form 498 ID, make sure all pages of your fax clearly show the library's **Billed Entity Number (BEN)**.

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Banking Information Required for 498 ID

▬▬,

We have begun reviewing your FCC Form 498 application for ▬▬ COUNTY PUBLIC LIBRARY, and need additional information in order to issue your 498 ID to be used on your BEAR* invoice:

1. A clear image of a voided check, or
2. A statement from your financial institution that includes the bank name and your account number.

Please fax the requested documentation to **(888) 637-6226**. On the fax cover sheet, please include:

- Attention: **FCC Form 498 Processing Team,**
- Reference Number: **443**▬▬ and
- FCC Form 498 Nickname: ▬▬ **COUNTY PUBLIC LIBRARY.**

If you need further assistance, please call us, Monday through Friday from 9:30 am to 4:30 pm ET, at (888) 641-8722 and select option 3, or email us any time.

Thank you,

USAC Customer Support
(888) 637-6226; finopsprocessing@usac.org
usac.org/sl

*Billed Entity Applicant Reimbursement (BEAR) for the Schools and Libraries (E-rate) Program

Form 498 Rejection Notice

---------- Forwarded message ----------
From: **498 Bank Verification** <498BankVerification@usac.org>
Date: Thu, Jun 23, 2016 at 12:51 PM
Subject: Rejection for FCC Form 498 for   COUNTY PUBLIC LIBRARY - 443
To: "   " <   >

Dear   ,

USAC has reviewed your Form 498 for   COUNTY PUBLIC LIBRARY 498ID 443   and are unable to process this request due to the following issue(s):

- The banking information entered on your FCC Form 498 does not match the banking documentation submitted for verification (banking account # does not match). Please submit new banking documentation or update the banking information on the FCC 498

If you have questions, please call us between 9:30 AM-4:30 PM ET Monday through Friday, at (888) 641-8722 and select option 5, or email us at customersupport@usac.org.

Thank you,

USAC

_____
 The information contained in this electronic communication and any atta[...]   [...]tial or
privileged information. If you are not the intended recipient, or the perso[...]   [...]
communication in error and that any use, dissemination, forwarding, print[...]   [...]nication
and any attachments.

> **If your banking validation documents don't match the account information you listed on the Form 498, USAC will reject your form. You'll be asked to submit new documentation or to update your Form 498 (see next section).**

Form 498 Approval

- Once the banking documentation is approved, USAC will send a confirmation email from FINOPS-Processing@usac.org. Then you'll be able to list your Form 498 ID on BEAR forms.

- USAC will maintain your documentation only as needed to validate your banking information or as required by the Federal Communication Commission's records requirements. These documents will otherwise be destroyed.

Modifying a Form 498

Necessary only if your library's remittance information changes.

Records Search

News   Tasks (8)   **Records**   Reports   Actions

USAC TRAINING
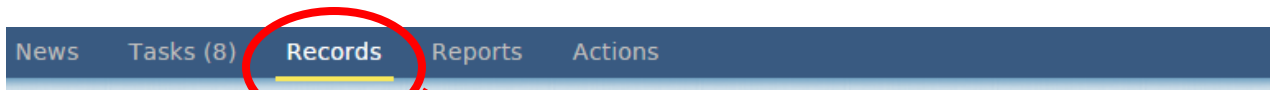
All ▸

Records

Applicant Entries
List of Applicant Entities

Consulting Firms
List of Consulting Firms

Customer Service Cases
List of Customer Service Cases

FCC Forms 470
List of FCC Forms 470

FCC Forms 471
List of FCC Forms 471

FCC Forms 498
List of FCC Forms 498

Funding Requests
A list of all Funding Request Numbers (FRNs)

Knowledge Base Center
E-rate help with FAQs, guidance documents, and videos

If your library's remittance information changes, you'll need to modify the Form 498. To locate the form, click on the Records tab at the top of the page and then Click on FCC Forms 498.

View List of Your Form(s) 498

Only your library's form should display. Click on the link to view the data.

Deactivate or Modify Form

Records / FCC Forms 498

Pioneer County Public Library direct deposit FY 2016-17 - #443000028 Follow

Deactivate FCC Form 498   Modify FCC Form 498

Application Information

Nickname   Pioneer ... 17

Click this button to deactivate a Form 498.

Form Number   44...

Status   Ce...

d Date   6/2/2016 12:32 PM EDT

ed By   library.system10.user1@mailinator.com

d Date   6/2/2016 1:54 PM EDT

Certified By   library.system10.user1@mailinator.com

Last Modified Da...

Last Modified ...

Click on this button to modify a Form 498.

General Information

Form Nickname   Pioneer County Public Library direct deposit FY 2016-17

Organization Name   Pioneer County Public Library System

Mailing Address   100 Main Street

DBA or FKA Name

Holding Company Name

Federal EIN

Modifying the Form

Modify an Existing FCC Form 498

In the E-rate Program, the FCC Form 498 is used by applicants who select the direct (BEAR) invoicing process. This form establishes your bank account with USAC by collecting banking and remittance information for the organization. All BENs associated with this organization and banking/remittance information should be included on this form. Submission requires School or Library Official certification.

Pioneer County Public Library System - Pioneer County Public Library direct deposit FY 2016-17 - 443000028

| Basic Information | General Financial Contact | Organization Numbers | Remittance Information | Associated BENs | Principal Communication Types | School or Library Official Certification |

Application Nickname

Please enter an application nickname here*

Pioneer County Public Library direct deposit FY 2016-17|

Organization Information

Name
Pioneer County Public Library System

Name Company is Doing Business As (DBA) or Formerly Known As (FKA)

Holding Company Name

Mailing Address
100 Main Street
Boonesburg, KY 40

Federal EIN, or TA

Once 'Save and Continue' is clicked, you will be able to leave the form without losing any entered information fror
'Tasks' tab.

Cancel

Save and Continue

> **Edit each page as needed. You'll certify the form again—just like when you completed it the first time.**

Form 498 Questions?

- **Lauren Abner**, **KDLA's Technology Consultant:**
  - **lauren.abner@ky.gov**
  - **(502) 564-1728**
- **USAC Customer Operations:**
  - **1-888-641-8722 option 5**
    - **NOTE: This number is different than general customer service from the USAC Client Services Bureau (888-203-8100).**
  - **File a customer service case in the E-rate Productivity Center (EPC)**

E-rate BEAR Form 2016

Lauren Abner

July 2016

The BEAR, Briefly

- **BEAR = Billed Entity Applicant Reimbursement**
- **Libraries file BEAR forms after paying the full invoice upfront**
- **3 big changes starting July 1, 2016:**
  - **Libraries will receive reimbursement via direct deposit**
  - **No more paper BEAR forms can be submitted**
  - **Service providers no longer certify BEAR forms**

E-rate Cycle
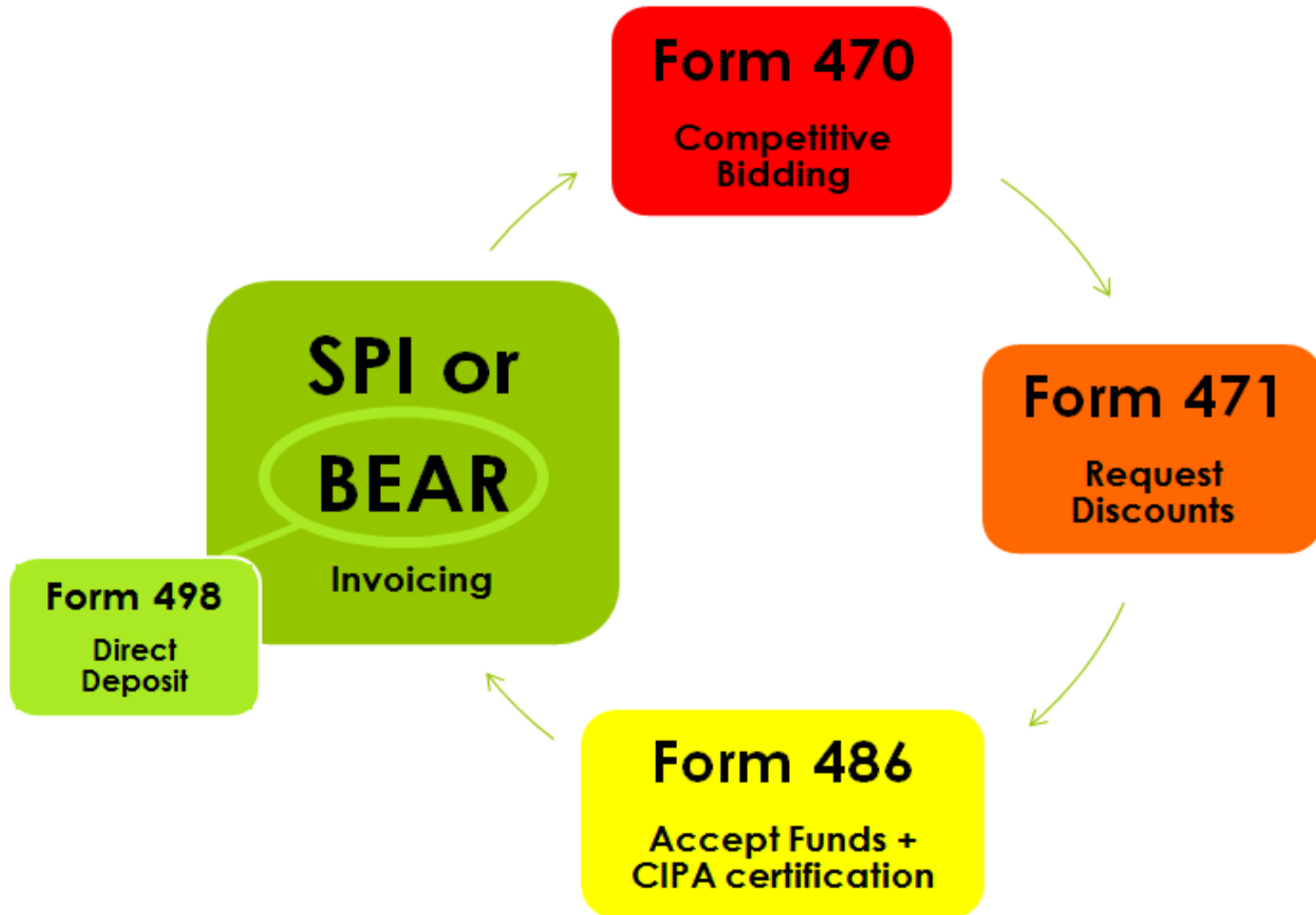
BEAR Tips

- BEARs can't be filed until bills have been paid.
- BEARs can't be filed without the library's Form 498 ID– this ID # provides direct deposit information.
- File BEARs as frequently (annually, quarterly, etc.) as you like.
- File one form for each service provider.
- You can request 1 filing extension of 120 days: http://www.usac.org/sl/applicants/step06/invoice-extensions.aspx

Deadlines

- **You must complete invoicing no later than 120 days after the last date of service.**
- **For recurring services such as internet or phone, the last day of service is generally June 30 and last date to invoice is October 28th.**
  - **FY 2015-16 (services between July 1, 2015 to June 30, 2016) must be invoiced by October 28, 2016.**
  - **FY 2016-17 (services between July 1, 2016 to June 30, 2017) must be invoiced by October 28, 2017.**
- **For non-recurring, one-time purchases, you must complete invoicing no later than 120 days after purchase or vendor installation.**

BEARs by the Numbers

- **You need the following to file a BEAR:**
  - **Identifying information:**
    - Billed Entity Number (BEN)
    - Your PIN for online forms (see next 2 slides)
    - Library's Form 498 ID (9 digits, starts 443) – will appear on a drop-down on the form
  - **Funding request information:**
    - Form 471 number
    - Funding Request Number (FRN)
    - Invoice Dates
    - Eligible invoiced amount
- **This information will appear on your Funding Commitment Decision Letter (FCDL) or can be researched on E-rate Central—enter your BEN on this page: http://e-ratecentral.com/us/stateInformation.asp?state=KY**

PINs (1/2)

- Every library staff member who will prepare or certify BEAR forms **must** have their own Personal Identification Number—PINs are specific to the person. Logging in with a PIN certifies that you are the person associated with that PIN.
- If you still have a PIN from previous years, continue using it.
- To change or disable a PIN, use this page: https://slpin.universalservice.org/Pin/PinArea.aspx

PINs (2/2)

- To request a PIN, contact the USAC Client Services Bureau, M-F, 8:00 a.m. to 8:00 p.m.
    - Phone: 1-888-203-8100
    - E-rate Productivity Center – from My Landing Page, click on the 'Contact Us' link; submit a completed PIN request template from the PIN page of the USAC website: **http://www.usac.org/sl/tools/forms/pin.aspx**
- Info you'll need
    - Library name + BEN
    - Full name, job title, and email of BEAR filer
    - **Street** address where PIN will be mailed
- PIN will be mailed within 2 weeks

Online BEAR Login

https://www2.sl.universalservice.org/bear/login.aspx

Block 1: Header Information

Helping Keep Americans Connected

BEAR Home   **New BEAR Form**   **Track Form**   **Bulk Download**   **Terms and Conditions**   **Logout**

Add BEAR Invoice

Enter a nickname for your reference.

Applicant Form Identifier MyNickname

Block 1: Header Information

Need Help?

1. Billed Entity Name
PUBLIC
LIBRARY

2. Billed Entity Number

**3. Service Provider
Identification Number (SPIN)**
143666666

Service Provider Name
SLD Interim

Applicant FCC Form 498 ID
▼

Once you enter the SPIN, your service provider's name will pop up.

4. Contact Name Lauren Abner

5. Contact Telephone Phone (502) 564 - 1728 ext.

Contact Fax ( ) -

Contact Email lauren.abner@ky.gov

Enter your contact information. Email is the preferred method.

6. Total Reimbursement Amount
(total from Block 2, Column 14)
$ 0.00

Your library's Form 498 ID(s) will appear on this drop-down once banking information has been validated.

Block 2: Line Item Information

Block 2: Line Item Information Per Funding Request Number

Need Help?

The amount billed to the USAC (#14) is calculated from the amount entered in #12 & the discount % (which will auto-populate).

7. FCC Form 471 Application Number (from Funding Commitment Decision Letter)	8. Funding Request Number (FRN) (from Funding Commitment Decision Letter)	9. Bill Frequency	10. Customer Billed Date	11. Shipping date to Customer or Last Day of Work Performed (mm/dd/yyyy)	12. Total (Undiscounted) Amount for Service	13. Discount Rate	14. Discount Amount Billed to USAC (Column 12 multiplied by Column 13)
16000	169900					0	

ANNUALLY
EVERY TWO MONTHS
MONTHLY
ON DELIVERY
ONE-TIME
OTHER
QUARTERLY
SEMI-ANNUALLY
TWICE A MONTH
WEEKLY
EVERY TWO WEEKS

Add Line Item

#9: Choose the appropriate billing frequency. Category Two purchases are likely One-Time.

Enter a date in #10 for recurring services (phone or internet), #11 for one-time services (like equipment). Use only one of these for each FRN.

#12: Enter the eligible amount you were charged on the invoices you're submitting.

Add Line Item if you have more invoices for the same service provider.

B. The discount amounts listed in this Billed Entity... ...ere already billed by the Service P...

Block 3: Billed Entity Certification

Block 3: Billed Entity Certification

Need Help?

I declare under penalty of perjury that the foregoing is true and correct and that I am authorized to submit this Billed Entity Applicant Reimbursement Form on behalf of the eligible schools, libraries, or consortia of those entities represented on this Form, and I certify to the best of my knowledge, information and belief, as follows:

☑ **A.** The discount amounts listed in this Billed Entity Applicant Reimbursement Form represent charges for eligible services and/or equipment delivered to and used by eligible schools, libraries, or consortia of those entities for educational purposes, on or after the service start date reported on the associated FCC Form 486.

☑ **B.** The discount amounts listed in this Billed Entity Applicant Reimbursement Form were already billed by the Service Provider and paid for by the Billed Entity Applicant on behalf of eligible schools, libraries, and consortia of those entities.

☑ **C.** The discount amounts listed in this Billed Entity Applicant Reimbursement Form are for eligible services and/or equipment approved by the Fund Administrator pursuant to a Funding Commitment Decision Letter (FCDL).

☑ **D.** I acknowledge that I may be audited pursuant to this application and will retain for at least 10 years (or whatever retention period is required by the rules in effect at the time of this certification), after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request any and all records that I rely upon to complete this form.

☑ **E.** I certify that, in addition to the foregoing, this Billed Entity Applicant is in compliance with the rules and orders governing the schools and libraries universal service support program, and I acknowledge that failure to be in compliance and remain in compliance with those rules and orders may result in the denial of discount funding and/or cancellation of funding commitments. I acknowledge that failure to comply with the rules and orders governing the schools and libraries universal service support program could result in civil or criminal prosecution by law enforcement authorities.

Check all of these certifications.

Contact Information

Contact Information for Billed Entity Authorized Person:

To certify the form, #15 must be checked.

15. Signature ☑

By logging into your account using your PIN, checking this box, and clicking the "certify" button at the end of the form, you have electronically signed the form. You are reminded that an electronic signature is the same as a handwritten signature on the form. To see a copy of the Terms and Conditions to which you previously agreed, please click on the "Terms and Conditions" menu above.

16. Date 7/1/2016

17. Name	LAUREN ABNER
18. Title/Position	Technology Consultant
20. Address 1	PO Box 537
Address 2	300 Coffee Tree Rd.
City	Frankfort
State	KY
Zip Code	40602 -

19. Phone Number (502) 564 - 1728 ext.

19a. Fax Number ( ) - ext.

19b. Email LAUREN.ABNER@KY.GOV

19c. Name of Authorized Person's Employer KDLA

An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number.

Clear Save Certify and Submit

Enter your contact information and click on Certify and Submit. You also have the option to Save the form and return to it later.

Records Retention

- Remember to print a copy of any BEARs you submit and the invoices from your service providers.
- The current E-rate retention period is 10 years after the end of the funding year.
- If you're selected for a random audit, you may have to produce these records—accuracy and documentation are key!

MAKING ADJUSTMENTS

Form 500 and Service Substitution

FORM 500 (1/2)

- Reasons to file the Form 500:
  - Adjusting the Service Start Date on a previously filed Form 486
  - To adjust the Contract Expiration Date listed on the Form 471
  - To request an extension of the service delivery and installation deadline for non-recurring services (RARE –an option only under special circumstances)
  - **To cancel or reduce the amount of an FRN (irrevocably!)**
  - To notify USAC of an equipment transfer within the three year prohibition on equipment transfers due to a temporary or permanent entity closure

FORM 500 (2/2)

This form is necessary if you decide not to purchase Category Two equipment for which your library received a funding commitment.

- Form 500 releases $ back to the general funding pot for other E-rate entities to use in the following year.

- Your Category Two budget is reduced each time funds are committed to you; if you don't spend the funds, you need the Form 500 to release funding back to your possible Category Two budget over a 5-year period.

- Important for possible audits—USAC won't be happy if you didn't let them know the funds weren't used. You want to keep USAC happy!

Paper-only form is found online:
http://www.usac.org/sl/tools/forms/default.aspx

Service Substitutions

- Submit a Service Substitution if the product/service you listed on the Form 471 is no longer available.
  - Mostly relevant for Category Two equipment
  - Product or service must serve the same function
  - Can't receive more funding than the amount already committed for the original product or service
- Not an actual form; you must submit a letter containing the relevant information by fax, email, or mail
- Instructions are found on the USAC website: http://www.usac.org/sl/applicants/before-youre-done/service-substitutions.aspx

RESOURCES

- **KDLA**
  - **E-rate page:** http://kdla.ky.gov/librarians/programs/Pages/E-rate.aspx
  - **Archived Webinars:** http://kdla.ky.gov/librarians/staffdevelopment/Pages/KDLAArchivedWebinars.aspx
- **USAC**
  - **Schools & Libraries site:** http://www.usac.org/sl/
  - **Invoicing page:** http://www.usac.org/sl/applicants/step06/default.aspx
  - *SL News Brief*: http://www.usac.org/sl/tools/news-briefs/Default.aspx
- **E-rate Central**
  - http://e-ratecentral.com/

QUESTIONS?

- **Lauren Abner**, KDLA's Technology Consultant:
  - lauren.abner@ky.gov
  - **(502) 564-1728**
- **USAC Client Services Bureau**:
  - **1-888-203-8100**
  - **File a customer service case in the E-rate Productivity Center (EPC)**